



## IDENTIFYING SAVINGS AND MORE, WITH UNIFIED REPORTING

### Abstract

Vice President of Operations at a leading technology services company, Andrew Ross, heads its global reporting functions across 30+ countries. However, the company's unstructured, manually-intensive reporting system not only lacked efficiency, its inadequate consistency in formatting across geographies limited his visibility into key business metrics. This case details how Infosys BPM standardised, unified, and digitised Andrew's worldwide reporting system, delivering not only a fully integrated dashboard for greatly improved process visibility, but also \$320,000 in savings.



## Information scattered across the globe

Vice President of Operations at a global IT infrastructure and services company, Andrew Ross heads its worldwide reporting and performance management activities. He also supervises and presents the service level agreement (SLA) metrics for key business functions.

With the reporting system split across 30 different countries, Andrew often faced issues in identifying and analysing the company's business performance metrics. Every country used its own format and data sources for reports, creating an unstructured reporting system that

limited operational visibility and led to critical issues in managing volumes and workloads. Further, not only did the varied inputs make it difficult to assess evolving customer needs, but the fragmented system also utilised a variety of disconnected applications, calling for extensive manual intervention for every task.

Struggling to manage the increasing security risks — such as those of data breaches — and maintenance costs due to the variety of tools used, Andrew knew he needed transformation in his

reporting processes. However, the high interdependencies within the system and across levels meant that any change could affect the overall business operations. Looking for an end-to-end digital solution partner to safely standardise his entire reporting system, Andrew set out a global RFP, and after a long evaluation, signed on Infosys BPM in 2021 as a transformation partner. Over the next few days, he conducted a series of meetings with Marina Sanchez, the Infosys BPM team lead, to discuss the extant scenario and finalise the scope of the project.

## One framework to analyse it all

Marina sat with her team to study the drawbacks of the current system flow and devise a suitable solution. The main task before them was to develop a structured reporting framework to increase operational visibility and minimise manual intervention. After an in-depth analysis, they presented an accelerated “Get Fit”

strategy that would utilise a shared services model to digitise, modernise, and standardise the reporting system and help Andrew view all performance metrics and applications on a single pane. The objective included SLA dashboards to cover all volumetrics, consumer price index, key performance indicators

(KPI), genuine progress indicators, and operational dashboards to cover daily performance, productivity, quality, and accuracy metrics. The team planned to build these standardised dashboards and frameworks using Power BI.

## Approach summary



Designed a shared services strategy for standardised reporting



Deployed a four-phase approach to digitisation



Developed a fully-integrated dashboard with all metrics and applications



Leveraged Power BI and tactical automation

Andrew and Marina started the process by first prioritising the modernisation of Tier 1 applications. In the initial stage of developing a minimal viable product, they focused on these priority metrics based on their data availability and operational readiness. The team followed a batch-based reporting system and built a partially integrated dashboard covering CPI and KPIs. Then, they imagined the end-state, a 'single pane' digitised reporting structure that would display real-time data on all metrics and applications as a fully integrated dashboard.

For the aligned, digitised reports, Marina and her team undertook a detailed 4-phase approach. First, they developed a design framework to help classify and prioritise four types of metrics across 5 processes,

with a focus on business impact. Next, they identified 300+ existing business process metrics that were being measured by SLAs and countries. This helped create a consistent reporting format at all levels. Third, they prioritised and aligned all the metrics with service providers and the company's leadership. Lastly, after proper alignment, they designed, developed, and rolled out the digitised reporting system leveraging a shared services model.

While the shared services team initially took time to manually and tediously collate all data from multiple sources, they managed to capture 30%-40% of the data. They then continually validated and fine-tuned the numbers to arrive at the final integrated dashboard with an error-free, automated data flow. Throughout the

execution, Marina's team followed a tactical automation strategy primarily focusing on reporting, transaction processing, Excel formatting, and simple workflow tools like SQL and MS Excel. Interestingly, they built the digitised reporting system on an automation infrastructure that only required the Office 365 license, thus keeping costs low.

The project was not without its fair share of hurdles to be overcome. Marina initially faced some resistance from the regional stakeholders unwilling to accept the changed processes, but she succeeded in driving the implementation forward, leaning on Andrew's support and assistance when needed.

## Clearer view with less effort

Marina's standardised global reporting structure, single delivery platform, and fully integrated reporting dashboard unified the company's business data from across

all countries it operated in, significantly improving process visibility for Andrew and the entire organisation. The transformation also established a consistent reporting

format across all countries, greatly simplifying the access and assessment of critical information relating to over 100 business metrics.

## Key benefits



Diving into the benefits, the automated reporting system led to an 80% increase in reporting productivity and a 98% reduction in the manual effort required. Thus, the operations team in Poland and India which earlier spent a total of

over 30,000 hours annually on reporting processes, now needed only 1800 hours to complete the same tasks, saving the efforts of 16 full-time staff each year. Also, with the standardised dashboard and process automation, the new system saved up to

\$320,000 in costs for the company. This 'single pane' reporting structure clearly opened a new window of possibilities for Andrew!

*\*Names have been altered to preserve the identities of the people involved.*

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